Early/ Mid-Career Seminar
Wednesday, June 28, 2023

Virtual on Zoom for Government

Agenda

8:00	**Welcome & Housekeeping** – Jeffrey O'Connell, USDA
8:10	**Thrift Savings Plan – A-Z -** Stewart Kaplan, Thrift Savings Plan Board • *Make Wise Decisions Today: Retire With Dignity Tomorrow* • *Saving for Retirement: Your TSP Contributions* • *Choosing a Tax Treatment: Traditional or Roth?* • *Getting the Most Bang for Your Buck: Saving in the Thrift Savings Plan* • *Accessing your TSP Money While Still Employed: Loans and In-Service Withdrawals*
9:45	**Break**
10:00	**Thrift Savings Plan – A-Z - Part II** • *First Steps: Preparing for Separation* • *Turning Savings to Income: The TSP Retirement Income Options* • *Withdrawal Rules: Other Considerations* • *Planning Your Legacy: TSP Death Benefits* • *Getting Help: Resources for Participants*
NOON	**Lunch (~12:00 pm to ~12:30pm)**
12:30	**TSP Follow up Questions** Stewart Kaplan, continued, Thrift Savings Board
12:45	**Federal Employees Retirement System** Myesha Williams, U.S. Army Benefits Center
2:15	**Break**
2:30	**Employee Benefits and Leave Administration** Kimberly Whittet, USDA - NIFA
3:30	**Social Security Administration Overview** David Seymour, Senior Public Affairs Specialist, SSA, KCRAO
4:30	**Adjourn**

Presenters

STEWART KAPLAN, TSP Training and Liaison Specialist. Stewart joined the staff of the Federal Retirement Thrift Investment Board* in April 2013. As a member of the Office of Communications and Education staff, he conducts participant seminars as well as in-depth classes for Human Relations and Payroll Offices for Federal agencies throughout the United States.

He retired from the Air Force in 2013 and help positions in the Marine Corps in Japan and the Air Force at the Pentagon as a Personal Financial Readiness Manager and Educator. He holds a Master of International Management Degree from Whitworth University and a Certificate in Financial Planning from Kaplan University.

Steward is an Accredited Financial Counselor and a Registered Financial Consultant. He also holds the designations of Certified Employee Benefits Specialist through the International Foundation of Employee Benefit Plans of Wharton Business School and Retirement Income Certified Professional through the American College of Financial Services.

MYESHA WILLIAMS, Lead Human Resources Specialist, US Army Benefits Center-Civilian (ABC-C). Myesha has been a Team Lead for the Army Benefits Center since 2014. She joined the Army Benefits Center as a student hire in 2003. After graduating, she was hired as a Specialist to take incoming calls, process military buy back, and process federal employee's health and life insurance, counseling and processing estimates and retirements. In 2014 she became a Team Lead where she is a trainer, assigns and audits all actions produced though the Army Benefits Center. Myesha is considered an expert in handling angry and hostile customers, by the end of the call she is their best friend and she is then on their Christmas card list…Myesha is a warm, bubbly presenter and will make you laugh while you also learn.

KIMBERLY WHITTET, Senior Policy Advisor, National Institute of Food and Agriculture (NIFA), U.S. Department of Agriculture, Washington, DC. Ms. Whittet has served in numerous roles in her 18-year Federal career at NIFA. Beginning as a Program Specialist she supported national research, education, and extension programs in the areas of animal sciences. She then served for 11 years as the Administrative and Operations Specialist and Officer, a senior advisor and expert on the agency head's management team, formulating and executing administrative and operations management programs and policies. Ms. Whittet is currently the Senior Policy Advisor and financial policy expert on Federal regulations and plans, develops, and recommends policies and procedures for Federal financial assistance and special projects.

DAVID SEYMOUR is the Senior Public Affairs Specialist for Region VII of the Social Security Administration. He began his federal service as a Congressional Aide, then joined SSA in the Chicago Region where he served as a Claims Representative, Operations Supervisor and Public Affairs Specialist. In 2016, David relocated to Kansas City to serve as a Technical Training Instructor for new SSA employees nationwide. His current duties in the Regional Public Affairs Office include serving as a liaison for congressional offices, assisting with media inquiries, and promoting public awareness and understanding of the programs Social Security administers. David also mentors SSA employees and young professionals through City Year and the Mid-America LGBT Chamber of Commerce. He received his Bachelor of Arts in Spanish and Latin-American Studies from Earlham College. This opened the door to exciting international travels, teaching Spanish language and Latin dance in community and academic settings, and other meaningful experiences in the public sector. David ultimately received a Master of Public Affairs from Indiana University and soon thereafter embarked on a rewarding career with SSA.